

Practice Management Program

30 MUST - DO MARKETING ACTIVITIES CHECKLIST



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Item	Done (Y/N)	Will Do (Y/N)
1. Define Your Target Markets & Ideal Client		
2. Define Specific Marketing Budget: Monthly/Quarterly/Annually		
3. Create Feed Name Database to track prospects/referrals		
4. Obtain Prospect & COI lists from Direct Mail Programs		
5. Create a Prospect & COI prospecting strategy		
6. Send a Self-Mailed Personalized Brochure of the Services You can Provide to Prospects & COIs		
7. Create your 15-Second Commercial		
8. Set-up your Personalized Web Site		
9. Set up your compliance approved Social Media profiles (i.e. LinkedIn, FaceBook, etc...)		
10. Promote your web site in local directories (Professional Association, Chamber of Commerce) and Online Yellow Pages (Yahoo, Google, MSN, AOL)		
11. Work with "A+/A" Clients to Develop Real Life Testimonials		
12. Update your e-mail signature with proven message, format, licenses/designations, contact information, etc...		
13. Build credibility using compliance approved Reprints		
14. Choose a Newsletter appropriate for your target audience		
15. Develop a local advertising campaign with print, radio, television and billboard options		
16. Announce accomplishments with "Press Releases"		
17. Place compliance Pre-Approved articles in targeted publications		

18. Secure endorsed seminar opportunities		
19. Use appropriate promotional gifts (leverage Wholesaler support)		
20. Choose sponsorships with Wholesalers aligned with your target market		
21. Develop a Client Advisory Council to help you build a stronger business		
22. Set up a COI/Client Referral Thank You Program		
23. Stay in touch with handwritten Notes		
24. Remember clients with Birthday/Holiday Gifts/Cards		
25. Build client and COI relationships with Seasonal Events		
26. Build Relationships with non-business COI, client & spouse focused Events/Entertainment		
27. Provide Value Added Education with Systematic Newsletters via email		
28. Hold Annual Reviews to update any changes in your clients plans		
29. Develop a Cross-Selling Campaign amongst existing clients		
30. Create a formalized cross referral strategy with existing COIs		